



INDUSTRY PROFILE

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High Technology Manufacturing

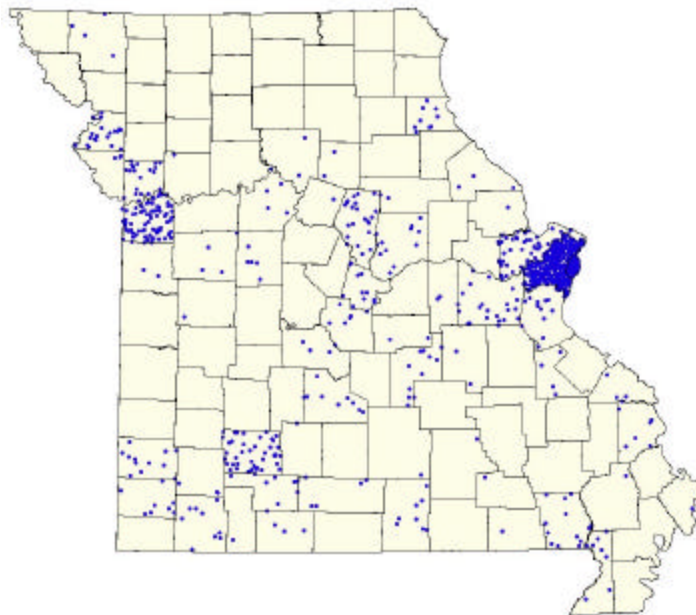
INDUSTRY DESCRIPTION

High technology manufacturing industries are those that require a significant number of computer scientists, engineers, life scientists, and mathematicians. This industry includes the manufacture of: industrial inorganic, organic, and agricultural chemicals; plastics; drugs; soaps and detergents; paints; petroleum refining; engines and turbines; machinery; computer, electrical and communications equipment; aircraft; missiles and space vehicles; tanks; navigation equipment; scientific and medical instruments; and photographic equipment. Industry definition from the Center for Urban Policy Research (A.K. Glasmeier, 1991).

HIGH TECHNOLOGY MANUFACTURING MISSOURI INDICATORS, 1990-2000

	1990	2000	Percent Change
Total Employment	123,020	91,794	-25.4%↓
Total Wages (Millions, 2000 Dollars)	\$5,525	\$4,508	-18.4%↓
Annual Wage Per Job (2000 Dollars)	\$44,908	\$49,110	9.4%↑
Total Firms	1,233	1,356	9.9%↑

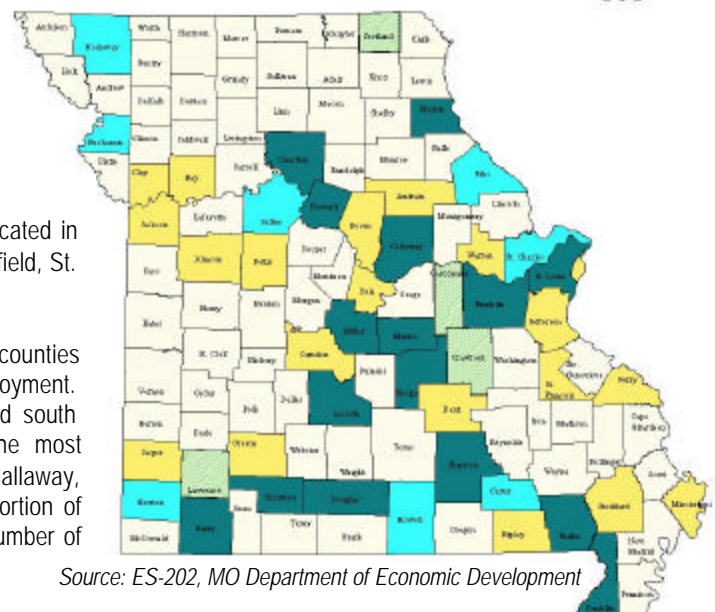
Source: ES-202 MO Department of Economic Development



• = 100 Jobs

Specialization Ratios

- High Specialization (SR > 1.5)
- Above Average Specialization (SR = 1.05 - 1.5)
- Average Specialization (SR = .95 - 1.05)
- Below Average Specialization (SR = .500 - .95)
- Low Specialization (SR < .50)

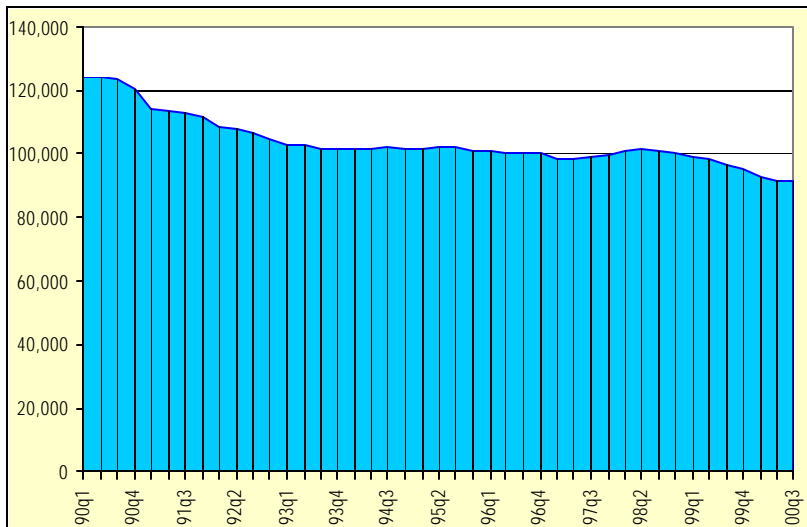


EMPLOYMENT AND SPECIALIZATION, 2000

In 2000, the majority of high technology manufacturing jobs were located in the metropolitan areas of the state - Columbia, Kansas City, Springfield, St. Joseph, and St. Louis.

According to specialization ratios (location quotients), 16 Missouri counties were highly specialized in high technology manufacturing employment. These areas were concentrated in the rural areas of central and south central Missouri; and in the suburban areas of St. Louis. The most specialized counties in the state were Douglas, Maries, Miller, Callaway, and Chariton. It is important to note that SRs measure the proportion of industry employment relative to the state average, not the total number of jobs.

Source: ES-202, MO Department of Economic Development

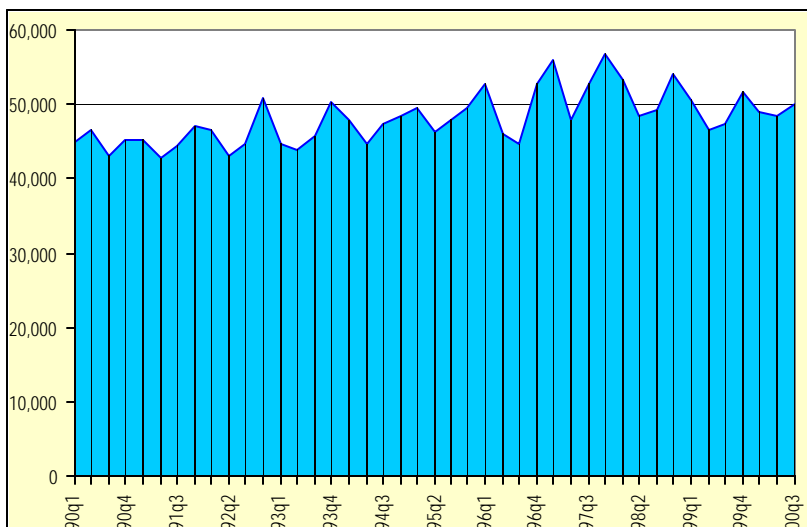


EMPLOYMENT TRENDS, 1990-2000

High technology manufacturing employment in Missouri has steadily declined since 1990. The most current data estimates 91,341 high tech manufacturing jobs during 3rd quarter 2000.

Employment was highest during 2nd quarter 1990, with 124,178 jobs. Employment was lowest during 3rd quarter 2000, with 91,341 jobs.

Source: ES-202, MO Department of Economic Development



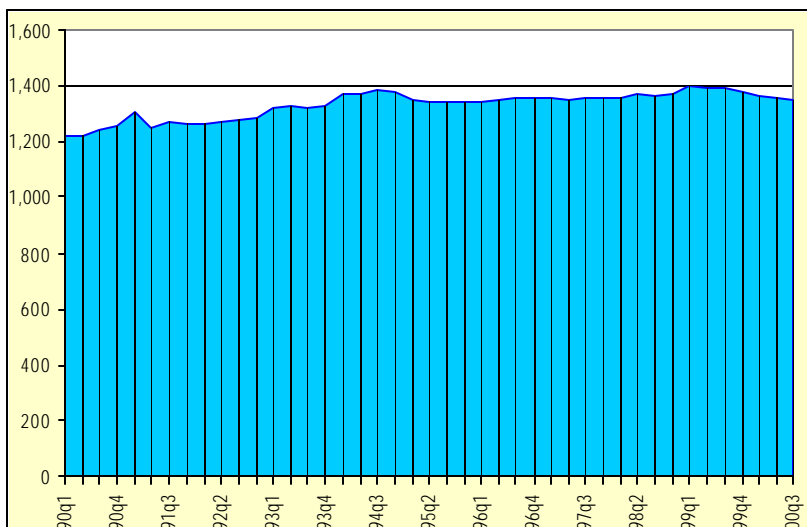
ANNUAL AVERAGE WAGE PER JOB TRENDS, 1990-2000

Annual average wages per job in high technology manufacturing in Missouri has steadily increased - albeit slowly - since 1990. The most current data estimates an average wage per job of \$49,592 during 3rd quarter 2000 - higher than the state average wage of \$30,497. During the past decade, average wages per job show peaks during 4th quarter and troughs during 2nd quarter - indicating seasonality.

Average wages per job were highest during 4th quarter 1994, at \$56,764 per job. Average wages per job were lowest during 2nd quarter 1991, at \$42,650 per job.

Wages adjusted to 2000 real dollars.

Source: ES-202, MO Department of Economic Development



FIRM TRENDS, 1990-2000

The number of high technology manufacturing firms in Missouri has increased since 1990 - although firms have decreased somewhat since mid 1999. The most current data estimates 1,348 high tech manufacturing firms during 3rd quarter 2000.

Firms were most numerous during 1st quarter 1999, at 1,397 establishments. Firms were least numerous during 1st quarter 1990, at 1,220 establishments.

Source: ES-202, MO Department of Economic Development

For more information:

Research and Planning
Missouri Department of Economic Development
620 Harry S. Truman Building
Jefferson City, Missouri 65102



TEL: 573-522-6261
FAX: 573-751-7385
E-MAIL: dpeters4@mail.state.mo.us
WEB: <http://www.MissouriEconomy.org>